

# Creating a Bridges Plan



## Knowledge Base Article

# Creating a Bridges Plan

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# Creating a Bridges Plan

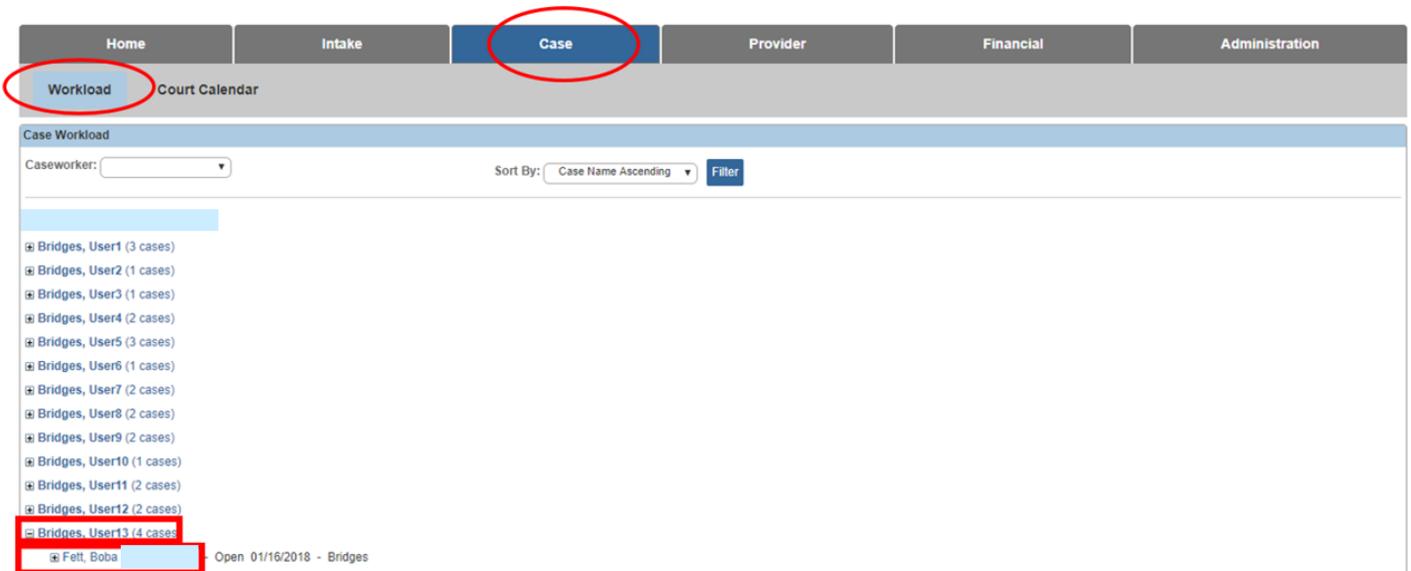
## Overview

This document provides step-by-step instruction for creating a Bridges Plan.

## Navigating to the Bridges Plan

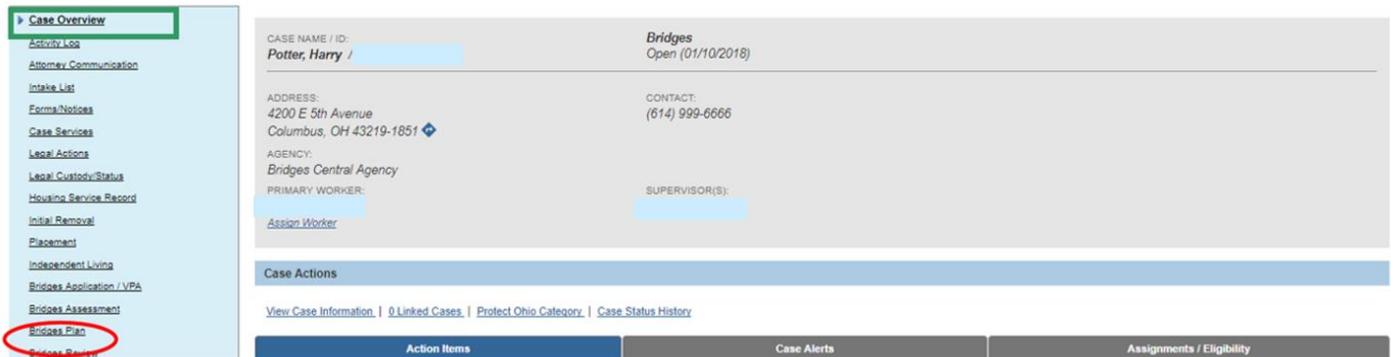
From the Ohio SACWIS home page:

1. Click, **Case**.
2. Click, **Workload**.
3. Click the name of the appropriate **Caseworker**.
4. Click the relevant case number.



The **Case Overview** screen appears.

5. Click, **Bridges Plan** in the navigation pane.

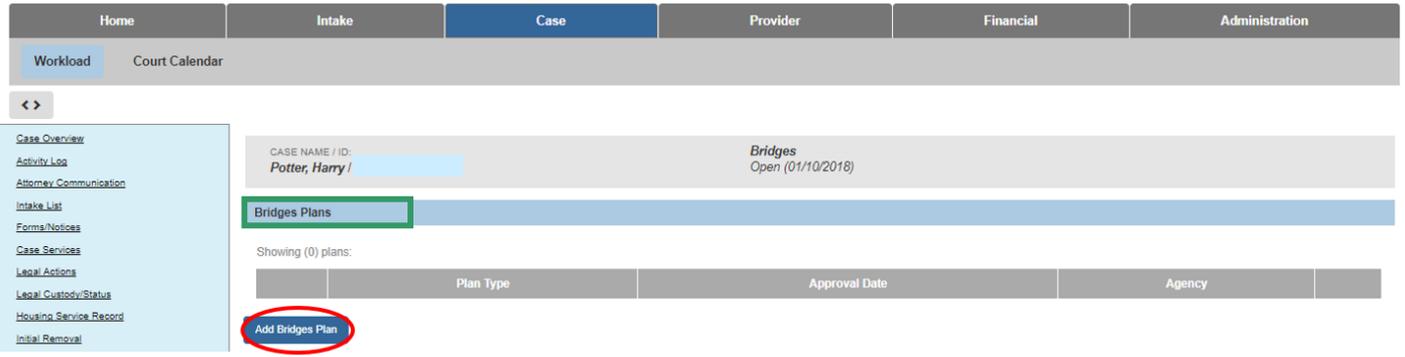


# Creating a Bridges Plan

The **Bridges Plans** grid appears.

6. Click, **Add Bridges Plan**.

**Important:** An initial assessment must be completed before the initial Bridges Plan can be approved.

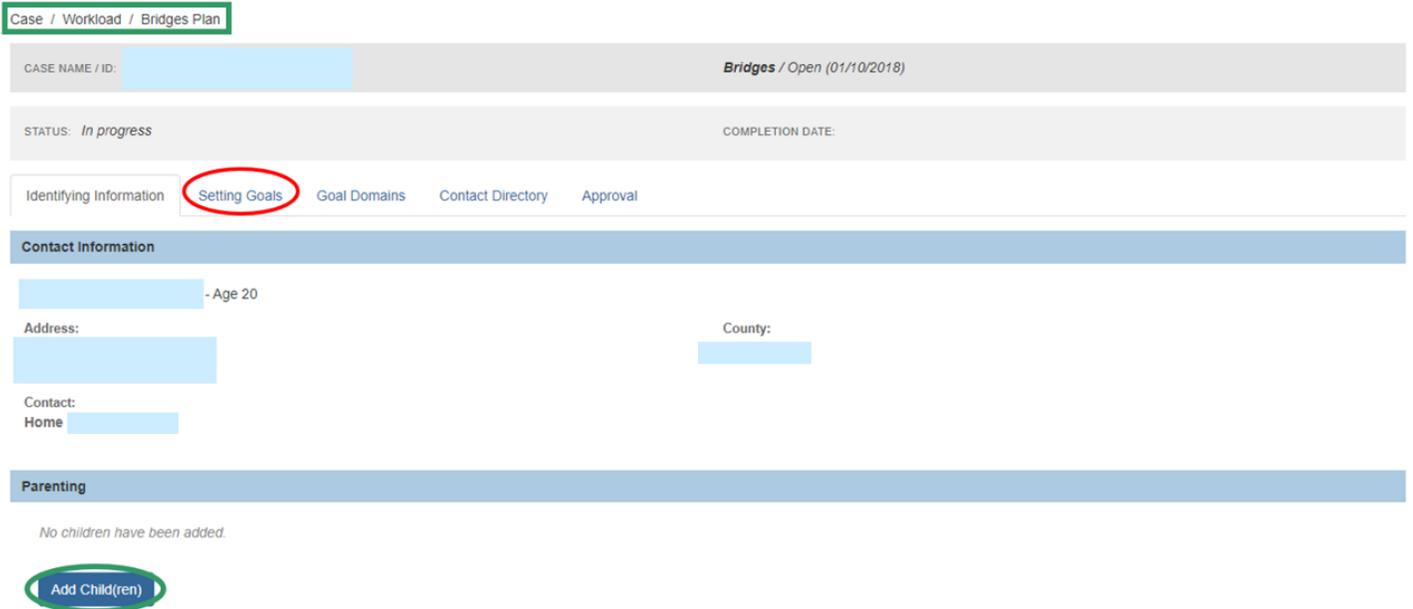


The **Bridges Plan** screen appears; the **Identifying Information** tab is highlighted.

7. Click the **Setting Goals** tab and skip to the section titled: **Completing the Setting Goals Tab**.

**OR**, If the young adult has children, click **Add Child(ren)** and see the **Adding a Child(ren)** section below.

**Note:** Your information will be saved as you navigate among the tabs.



# Creating a Bridges Plan

## Adding a Child(ren)

### Adding an Available Child(ren)

From the **Bridges Plan** screen:

1. Click, **Add Child(ren)**.

Case / Workload / Bridges Plan

CASE NAME / ID: **Potter, Harry** Bridges / Open (01/10/2018)

STATUS: *In progress* COMPLETION DATE:

Identifying Information | Setting Goals | Goal Domains | Contact Directory | Approval

**Contact Information**

Potter, Harry / - Age 18

Address:  
4200 E 5th Avenue  
Columbus, OH 43219 - 1851

County:

Contact:  
Cell (614) 999-6666  
Email iamawizard@yahoo.com

**Parenting**

No children have been added.

**Add Child(ren)**

The **Add Children** screen appears.

2. If there are already children listed in the **Available Child(ren)** grid, place a checkmark in the checkbox of the appropriate child(ren).
3. Click, **Save**.

**Add Children**

CASE NAME / ID: **Potter, Harry** Bridges / Open (01/10/2018)

**Available Child(ren)**

<input type="checkbox"/>	Name
<input type="checkbox"/>	Granger, Hermione /
<input checked="" type="checkbox"/>	Harry, Little /

**Add Case Member** **Add Associated Person**

**Save** **Cancel**

# Creating a Bridges Plan

The **Bridges Plan** screen appears, with the **Identifying Information** tab highlighted. The added child(ren) is listed in the **Parenting** grid.

**Note:** If a child needs to be added to the Bridges Plan, but is unknown to Ohio SACWIS, please refer to the following KBA for instruction on adding a person: [Managing Person-Level Relationships](#).

4. Make selections from the drop-down menus in the **Important Documents** grid.
5. Click the **Setting Goals** tab.

The screenshot shows the 'Bridges Plan' interface. At the top, a breadcrumb trail reads 'Case / Workload / Bridges Plan'. Below this, the case name is 'Bridges / Open (09/21/2017)' and the status is 'In progress'. The 'Setting Goals' tab is highlighted with a red circle. The 'Contact Information' section includes fields for 'Address' and 'County'. The 'Parenting' section features an 'Add Child(ren)' button. The 'Important Documents' section contains several dropdown menus for 'Birth Certificate', 'State I.D./Driver's License', 'Social Security Card', and 'Citizen/Immigration Docs', all set to 'Have' or 'Not applicable'. A checkbox at the bottom indicates 'Young Adult has a safe place to keep important documents'.

# Creating a Bridges Plan

The **Bridges Plan** screen appears with the **Setting Goals** tab highlighted.

## Completing the Setting Goals Tab

1. Select the radio button beside the appropriate answer to the question: **Have you ever set goals for yourself?**
2. Enter narrative in the text boxes.
3. Click the **Goal Domains** tab.

Case / Workload / Bridges Plan

CASE NAME / ID: *Potter, Harry /* Bridges / Open (01/10/2018)

STATUS: *In progress* COMPLETION DATE:

Your data has been saved

Identifying Information **Setting Goals** Goal Domains Contact Directory Approval

**Setting Goals**

Have you ever set goals for yourself?

Yes

No

Not Answered

Please Explain: [\(expand full screen\)](#)

Where do you see yourself once you have completed the Bridges program? [\(expand full screen\)](#)

The **Goal Domains** grid appears.

**Note:** There are seven entries in the Goal Domains list. As you go through the setting goals process, select the domains that are relevant to the young adult.

**Important:** Whatever goal domains are selected, the overall process for setting goals is the same, but the screens requesting information will vary depending on your specific domain selection. The example below provides instruction on completing the **Self-Development and Healthy Relationships** goal domain.

4. Click the **Inactive** box beside **Self-Development and Healthy Relationships**.

**Important:** This will cause the corresponding goal domain title to become an active link.

# Creating a Bridges Plan

Case / Workload / Bridges Plan

CASE NAME / ID: *Bridges / Open (01/10/2018)*

STATUS: *In progress* COMPLETION DATE:

✔ Your data has been saved.

Identifying Information | Setting Goals | **Goal Domains** | Contact Directory | Approval

**Goal Domains**

No active domains exist.

- Self-Development and Healthy Relationships  INACTIVE
- Home Management and Life Skills  INACTIVE
- Education  INACTIVE
- Employment and Career Preparation  INACTIVE
- Financial and Money Management  INACTIVE
- Health and Self Care  INACTIVE
- Legal  INACTIVE

Once the link is active:

5. Click the **Self-Development and Healthy Relationships** link.

**Note:** The red circle with the white exclamation mark indicates the section is incomplete; the symbol will remain until the section is complete.

Case / Workload / Bridges Plan

CASE NAME / ID: *Bridges / Open (01/10/2018)*

STATUS: *In progress* COMPLETION DATE:

✔ Your data has been saved.

Identifying Information | Setting Goals | **Goal Domains** | Contact Directory | Approval

**Goal Domains**

- Self-Development and Healthy Relationships**  ACTIVE
- Home Management and Life Skills  INACTIVE

The **Self-Development and Healthy Relationships Details** grid appears.

## Completing the Self-Development and Healthy Relationships Link

1. Select an answer to the question, **Are you registered to vote?**
2. Enter narrative in the text box.

**Note:** If you answer in the affirmative to the first question, you will be prompted to answer the question: **Is your registration address up to date?**

3. Enter narrative in the text box.
4. Click the **Goals** tab.



# Creating a Bridges Plan

## 4. Click, **Link Service**.

Case / Workload / Bridges Plan

**Add/Edit Goal**

CASE NAME / ID: **Potter, Harry /** Bridges / Open (01/10/2018)

STATUS: *In progress* COMPLETION DATE:

### Goal Details

Domain:  
Self-Development and Healthy Relationships

Goal: \*  
Please assist the young adult in creating attainable and measurable goal(s)

Goal Duration: \*

### Action Steps and Barriers

Action Steps: [\(expand full screen\)](#)  
Please list the activities identified by the young adult to achieve their goal. Include individuals who will assist the young adult, and their responsibilities, if applicable.

Barriers:  
Please list the obstacles identified by the young adult that may hold them back from completing their goal.

[\(expand full screen\)](#)

Linked Services ^  
There are no Linked Case Services.

**Link Service**

[End-Dated Services](#) v

The **Case Services Filter Criteria** grid appears.

## Adding Case Services

1. In the **Case Services** grid, select **Case Member** from the **Service** drop-down menu.
2. Click, **Add Case Services**.

### Case Services Filter Criteria

From Effective Date: [ ] [ ] To Effective Date: [ ] [ ]

Case Member: Potter, Harry v Status: [ ] v

Service Category: [ ] v Service Type: [ ] v

Service Goal: [ ] v Service: [ ] v

End-dated services:  Exclude  Include Linked Status: [ ] v

Sort Results By: [ ] v  Current Case Episode  View Historical

**Filter** **Clear Form**

### Case Services

Service: [ ] v **Add Case Services**

Result(s) 1 to 1 of 1 / Page 1 of 1

Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates
---------------------	-------------------------	------------------------	-----------------

# Creating a Bridges Plan

The **Case Services** screen appears.

3. Enter the **Effective Date**.
4. Make a selection from the **Service Category** drop-down menu.
5. Make a selection from the **Service Type** drop-down menu.
6. Make a selection from the **Case Member Name** drop-down menu.
7. Click, **Add Status/Provider**.

Case > Workload > Case Services

Service Information | Service Review | Service Activity

CASE NAME / ID: *Bridges / Open (01/10/2018)*

**Service Information**

Agency: Bridges Central Agency  
Risk Contributors: None

Effective Date: \* 01/30/2018  
Service Category: \* Bridges

Estimated Service End Date:   
Service Type: \* College Room and Board

**Member Service Status History**

Current Status  All Statuses

Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
Case Member Name: *	<input type="text"/>	<input type="text"/>				

**Add Status / Provider**

The **Service Information** screen appears.

8. Select, **Needed**, from the **Status** drop-down menu.

**Important:** If a selection other than “Needed” is made from the Status drop-down menu, Ohio SACWIS will display the following message: **A Provider record must be linked for member service status records of Referred, Scheduled and Provided.** If necessary, please see the following Knowledge Base Article for information regarding linking a Provider record: [Managing Case Services](#).

9. Enter the **Status Begin Date**.
10. Click, **Save**.

Case > Workload > Case Services > Service Information

CASE NAME / ID: *Potter, Harry /* *Bridges / Open (01/10/2018)*

**Status Details**

Case Member Name: Potter, Harry - 08/30/1998  
Service Category: Bridges  
Service Type: In-Home

Status: \* Needed  
Status Begin Date: \*

Status End Date:   
\* The following end information will only be saved if an end date is entered

End Reason:   
Secondary End Reason:

**Participation Frequency**

Expected Participation Frequency	How Long	Start Date	End Date

**Save** **Cancel**

# Creating a Bridges Plan

The **Case Services** screen appears, displaying the current status of the service in the **Member Service Status History** grid.

11. Click, **Save**.

Your data has been saved.

Case > Workload > Case Services

Service Information      Service Review      Service Activity

CASE NAME / ID: **Fett, Boba** /       **Bridges / Open (01/16/2018)**

**Service Information**

Agency: Bridges Central Agency  
Risk Contributors: None

Effective Date: \*       Estimated Service End Date:

Service Category: \*       Service Type: \*

**Member Service Status History**

Current Status     All Statuses

Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
<input checked="" type="checkbox"/> Fett, Boba - <input type="text"/>	Needed				01/23/2018	

Case Member Name: \* "/>   

The **Case Services Filter Criteria** screen appears.

**Important:** *The services are not yet linked to the Bridges Plan.*

12. Place a checkmark in the checkbox beside the Case Member name in the **Case Services** grid.

13. Click, **OK**.

Your data has been saved.

CASE NAME / ID: **Fett, Boba** /       **Bridges**  
Open (01/16/2018)

**Case Services Filter Criteria**

From Effective Date:       To Effective Date:

Case Member:       Status:

Service Category:

Service Goal:

End-dated services:  Exclude     Include      Service Type:

Sort Results By:       Service:

Linked Status:

Current Case Episode     View Historical

**Case Services**

Service:    

Result(s) 1 to 7 of 7 / Page 1 of 1

Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
<input checked="" type="checkbox"/> Fett, Boba	Bridges/College Room and Board	Case Member	01/23/2018 -	<input type="button" value="Not Linked"/>

# Creating a Bridges Plan

The **Add/Edit Goal** screen appears, displaying the linked service in the **Linked Services** grid.

## Selecting a Contact Resource

1. Click, **Select Contact Resource** in the **Contact Resources** grid.

The screenshot shows the 'Add/Edit Goal' interface. At the top, there is a header with 'Add/Edit Goal' and a case name 'Fett, Boba / Bridges / Open (01/16/2018)'. Below this, the status is 'In progress' and the completion date is blank. A 'Linked Services' section contains a table with one row: 'Fett, Boba' (Case Member Name), 'Bridges/Leased Housing' (Service Category / Type), 'Case Member' (Service Classification), and '01/23/2018 -' (Effective Dates). Below the table is a 'Link Service' button and an 'End-Dated Services' dropdown. The 'Contact Resources' section is currently empty, with a message 'There are no Contact Resources selected.' and a 'Select Contact Resource' button highlighted with a red box.

Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates
<a href="#">view</a> Fett, Boba	Bridges/Leased Housing	Case Member	01/23/2018 - <a href="#">unlink</a>

Case Member / Caregiver / Caretaker History

[Link Service](#)

[End-Dated Services](#) ▾

**Contact Resources**

There are no Contact Resources selected.

[Select Contact Resource](#)

The **Add Contact Resource** screen appears, displaying a list of contacts (Active and Inactive) relevant to the young adult.

**Important:** If a Contact Resource is added, the individual should be someone who can help the young adult with a specific goal(s). The contact must have an **Active** status for it to be available to add to the Bridges Plan.

2. Place a checkmark in the checkbox beside the individual you wish to add as a Contact Resource.
3. Click, **Save**.

**Important:** If it is necessary to add a contact person who is not already part of the case, see instructions for **Creating a New Contact** below.

**Note:** If there is no Contact Resource(s), it is not necessary to click the Select Contact Resource button.

# Creating a Bridges Plan

Case / Workload / Bridges Plan

## Add Contact Resource

CASE NAME / ID: **Fett, Boba** / [redacted] Bridges / Open (01/16/2018)

STATUS: *In progress* COMPLETION DATE:

✔ Your data has been saved. ✕

Contacts	
<input type="checkbox"/> [redacted]	ACTIVE <input type="checkbox"/>
Permanent Adult Connection	
<input type="checkbox"/> [redacted]	ACTIVE <input type="checkbox"/>
Permanent Adult Connection	

The **Add/Edit Goal** screen appears, displaying the added person(s) in the **Contact Resources** grid.

4. Click, **Save**.

**Note:** If a Contact Resource is no longer associated to a particular goal(s), delete the resource by clicking the trash can icon in the Contact Resources grid.

Case / Workload / Bridges Plan

## Add/Edit Goal

CASE NAME / ID: [redacted] Bridges / Open (01/10/2018)

STATUS: *In progress* COMPLETION DATE:

✔ Your data has been saved. ✕

Contact Resources	
[redacted] Alleged Mother	<input type="checkbox"/>
[redacted] Absent Parent	<input type="checkbox"/>
[redacted] Adoptive Brother	<input type="checkbox"/>

# Creating a Bridges Plan

The **Bridges Plan** screen appears, displaying the number of goals in the **Active Goals** grid.

The screenshot shows the 'Bridges Plan' interface for a case named 'Fett, Boba'. The status is 'In progress' and the completion date is '01/16/2018'. A green notification bar indicates 'Your data has been saved.' The navigation tabs include 'Identifying Information', 'Setting Goals', 'Goal Domains', 'Contact Directory', and 'Approval'. The 'Goal Domains' section is highlighted in blue. Underneath, the domain 'Self-Development and Healthy Relationships' is listed with a green box around it, showing '1 Goals' and an 'ACTIVE' toggle switch. Below this, 'Home Management and Life Skills' is listed with an 'INACTIVE' toggle switch.

**Important:** You can add as many goals as necessary for each domain by repeating the Adding Goals section.

This screenshot is similar to the previous one but shows the 'Self-Development and Healthy Relationships' domain with a red exclamation mark icon and '4 Goals' listed. The 'ACTIVE' toggle switch remains in the 'ACTIVE' position. The 'Home Management and Life Skills' domain is still shown as 'INACTIVE'.

5. Click the Inactive box beside any other goal domain relevant to the young adult and follow the instructions above for Adding Goals.

# Creating a Bridges Plan

## Creating a New Contact

From the **Add Contact Resource** screen:

1. Click, **Create New Contact**.

The **Contact Details** grid appears.

2. Click, **Search Person**.

Case / Workload / Bridges Plan

**Add Contact Resource**

CASE NAME / ID:  Bridges / Open (01/10/2018)

STATUS: *In progress* COMPLETION DATE:

✔ Your data has been saved. ✕

Case Members/Associated Persons:   -or-

The **Search for Person** grid appears.

3. Click, **Search**.

**Search For Person**

Person ID:  ~ OR ~ SSN:

Note: If Person ID or SSN are entered, all other search criteria will be ignored

OR

Last Name:  First Name:  Middle Name:  Gender:

DOB:   ~ OR ~ Age Range:  -    
 From Age To Age

Reference, TCN, and Address Criteria

Name Match Precision   
 Returns results matching entered names including AKA names/nicknames

Sort by:



# Creating a Bridges Plan

The **Add Contact Resource** screen appears, displaying the new contact.

7. Place a checkmark in the checkbox beside the appropriate person.
8. Click, **Save**.

Case / Workload / Bridges Plan

**Add Contact Resource**

CASE NAME / ID: Bridges / Open (01/10/2018)

STATUS: In progress COMPLETION DATE:

✔ Your data has been saved. X

**Contacts**

<input type="checkbox"/>	Other Contact Info: xxxx Permanent Adult Connection	ACTIVE
<input type="checkbox"/>	Other Contact Info: xxxxxx	ACTIVE
<input type="checkbox"/>		INACTIVE
<input checked="" type="checkbox"/>	Harry James Potter - Adoptive Brother 4020 E 5th AVE Columbus, OH 43219-1811 Primary Contact: (213) 121-2212	ACTIVE

Case Members/Associated Persons:  Add -or- Create New Contact

**Save** Cancel

The **Add/Edit Goal** screen appears, displaying the contact resource(s) in the **Contact Resources** grid. This process adds the **Contact Resource** to the list under the **Contact Directory** tab.

**Note:** A contact can also be added via the Contact Directory tab.

9. Click, **Save**.

Case / Workload / Bridges Plan

**Add/Edit Goal**

CASE NAME / ID: Bridges / Open (01/10/2018)

STATUS: In progress COMPLETION DATE:

✔ Your data has been saved. X

**Contact Resources**

- Adult	
---------	--

Select Contact Resource

**Save** Cancel

# Creating a Bridges Plan

The **Active Goals** grid is displayed.

10. If you are finished, click, **Save**.

**OR,**

Follow instructions previously provided to complete another Goal Domain(s).

Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates
Case Member / Caregiver / Caretaker History	Bridges/In-Home	Case Member	01/29/2018 -

**Note:** Each Goal Domain area has a tab labeled, **Doman Resources**. The Domain Resources tab houses links to various websites that contain subject matter relevant to the specific Goal Domain.

**Important:** *The same overall process of adding goals applies to each selected domain;* however, the specific information requested will vary for each domain. The screens will look different, depending on the selected domain.

## Viewing/Editing the Contact Directory Tab

Click the **Contact Directory** tab to view a list of Active and Inactive contacts.

**Note:** Until the Bridges Plan has been finished and saved, the Contact Directory can be edited to add and/or remove contacts.

## Completing the Approval Tab

Once all the required information has been provided for the Bridges Plan:

1. Click the **Approval** tab.

Case / Workload / Bridges Plan

CASE NAME / ID: Bridges / Open (01/10/2018)

STATUS: In progress      COMPLETION DATE:

✔ Your data has been saved.

Identifying Information   Setting Goals   Goal Domains   Contact Directory   **Approval**

# Creating a Bridges Plan

The **Approval Information** grid appears.

If all information required for the Bridges Plan *has not* been completed, the Approval Information grid will display a message(s) similar to the one below.

Case / Workload / Bridges Plan

CASE NAME / ID: **Potter, Harry** / [Redacted] **Bridges / Open (01/10/2018)**

STATUS: *Pending Approval* COMPLETION DATE:

✔ Your data has been saved. ✕

Identifying Information   Setting Goals   Goal Domains   Contact Directory   **Approval**

**Approval Information**

Identifying Information

- All statuses must be selected for Important Documents.

**Important:** If you receive a message indicating the plan is incomplete, return to the tab(s) identified and complete the information.

If all information for the Bridges Plan has been completed, the Approval Information grid will display the following message: **This Plan is ready for approval.**

2. Click, **Submit for Approval.**

Case / Workload / Bridges Plan

CASE NAME / ID: **Potter, Harry** / [Redacted] **Bridges / Open (01/10/2018)**

STATUS: *Pending Approval* COMPLETION DATE:

✔ Your data has been saved. ✕

Identifying Information   Setting Goals   Goal Domains   Contact Directory   **Approval**

**Approval Information**

*This Plan is ready for approval.*

**Submit for Approval**

# Creating a Bridges Plan

The **Process Approval** screen appears.

3. Make a selection from the **Action** drop-down menu.
4. If necessary, add narrative to the **Comments** text box.
5. Make a selection from the **Reviewers/Approvers** drop-down menu.
6. Click, **Save**.

Home Intake Case Provider Financial Administration

Alerts Action Items Approvals Assignments

Process Approval

Work Item

ID: [redacted] Type: CASE Reference: Potter, Harry  
Task ID: [redacted] Task Type: Bridges Plan Task Reference: Task Status:

Routing/Approval Action

Action: \* Please Select An Action

Comments: [redacted]

Agency: Bridges Central Agency

Reviewers/ Approvers: Please Select A Reviewer/Approver

Save Cancel

## Signing the Bridges Plan after Approval

Once the plan is approved, the **Signature** tab will appear on the **Bridges Plan** screen, and the Bridges worker will receive an action item advising them to sign the plan.

1. Click the **Signatures** tab.

Case / Workload / Bridges Plan

CASE NAME / ID: [redacted] Bridges / Open (02/06/2018)

STATUS: Approved COMPLETION DATE: 10/18/2017

Identifying Information Setting Goals Goal Domains Contact Directory Signatures

# Creating a Bridges Plan

The **Signatures Captured** grid appears.

2. Enter the **Date Signed** in the box beside the Bridges Worker's name.

**Note:** Once the Bridges Plan is signed, the young adult will sign a physical copy of the plan. The date the young adult signs the plan will then be entered into Ohio SACWIS.

Case / Workload / Bridges Plan

CASE NAME / ID:   Bridges / Open (02/06/2018)

STATUS: *Approved* COMPLETION DATE: 10/18/2017

Identifying Information   Setting Goals   Goal Domains   Contact Directory   Signatures

**Signatures Captured**

<span style="background-color: #ADD8E6; border: 1px solid #ADD8E6; padding: 2px;"> </span> Young Adult	Date Signed: <input type="text"/>	
<span style="background-color: #ADD8E6; border: 1px solid #ADD8E6; padding: 2px;"> </span> Bridges Worker	Date Signed: <input type="text"/>	
<span style="background-color: #ADD8E6; border: 1px solid #ADD8E6; padding: 2px;"> </span> Add Agency Representative		

If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).